



Gheen & Co.
Certified Public Accountant

Elite Business Ecosystem

Simplify. Save. Grow.

www.cpataxcoach.com



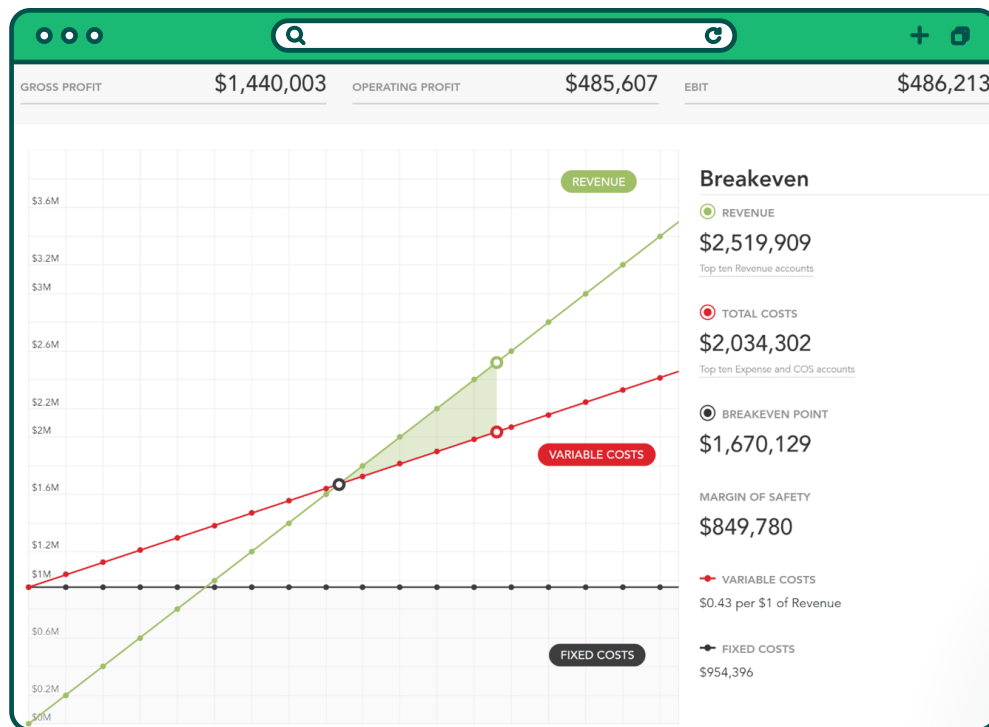
The Elite Business Ecosystem: Simplify. Save. Grow.

Simplify

A tax and accounting ecosystem you won't outgrow

We do two things to help you simplify: first, we upgrade your tax and accounting ecosystem using state-of-the-art, cloud-based software. Second, we take over or automate routine tasks.

Imagine working in a cloud-based, scalable, integrated financial management system. Imagine being able to review your company's financial performance from anywhere, in a way you can easily understand. Imagine focusing on your business performance, not administrative tasks. Imagine your tax and compliance work being handled by proactive experts.



The Elite Business Ecosystem: Simplify. Save. Grow.

Save

How much money would you save if someone besides you was being proactive about your taxes?

How often have you had that nagging thought that your CPA isn't really paying attention or giving you advice that could save you money in tax?

Proactive plan to reduce or eliminate taxes while complying with federal, state, and local law



Update

First, we thoroughly review your books and make important adjusting entries. Next we collect updated info from you about everything related to your books and taxes. Finally, we prep a tax plan for you the business owner.



Proactively Plan

Meet with your client manager to understand all the write-offs and deductions you're entitled to. Tax savings are explained and quantified! This happens 1–3 times a year depending on the service level you choose.



Implement & Save

Implement the tax savings strategies we recommend – with our advice and assistance. Then, make your quarterly tax payments on time. Our services are designed to save you far more than they cost you. Enjoy tax efficient earnings!



**IRS Advance
Notice™**

Our new IRS Advanced Notice service provides worry-free peace of mind against those unexpected IRS letters. We'll constantly monitor your IRS records for any changes and will let you know what's coming. We'll respond to your first letter and guide you on next steps!

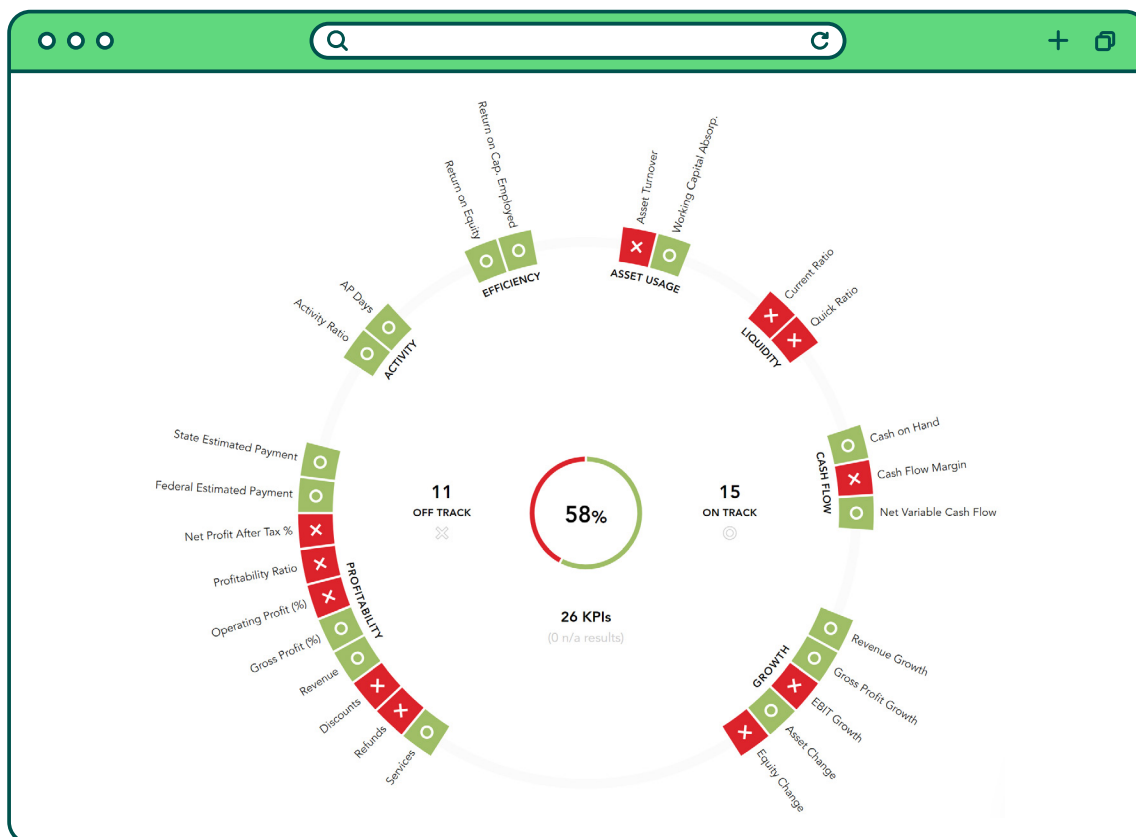


The Elite Business Ecosystem: Simplify. Save. Grow.

Grow

We will assess you on the 8 Key Drivers of Value and provide actionable information and recommendations to improve your score – and thus, the value of your business. Businesses with a score of 80+ on our assessment receive offers to buy their businesses that are 71% higher than those whose scores are average on our assessment.

Benchmark your business against your industry peers and competitors using your custom online financial dashboard.

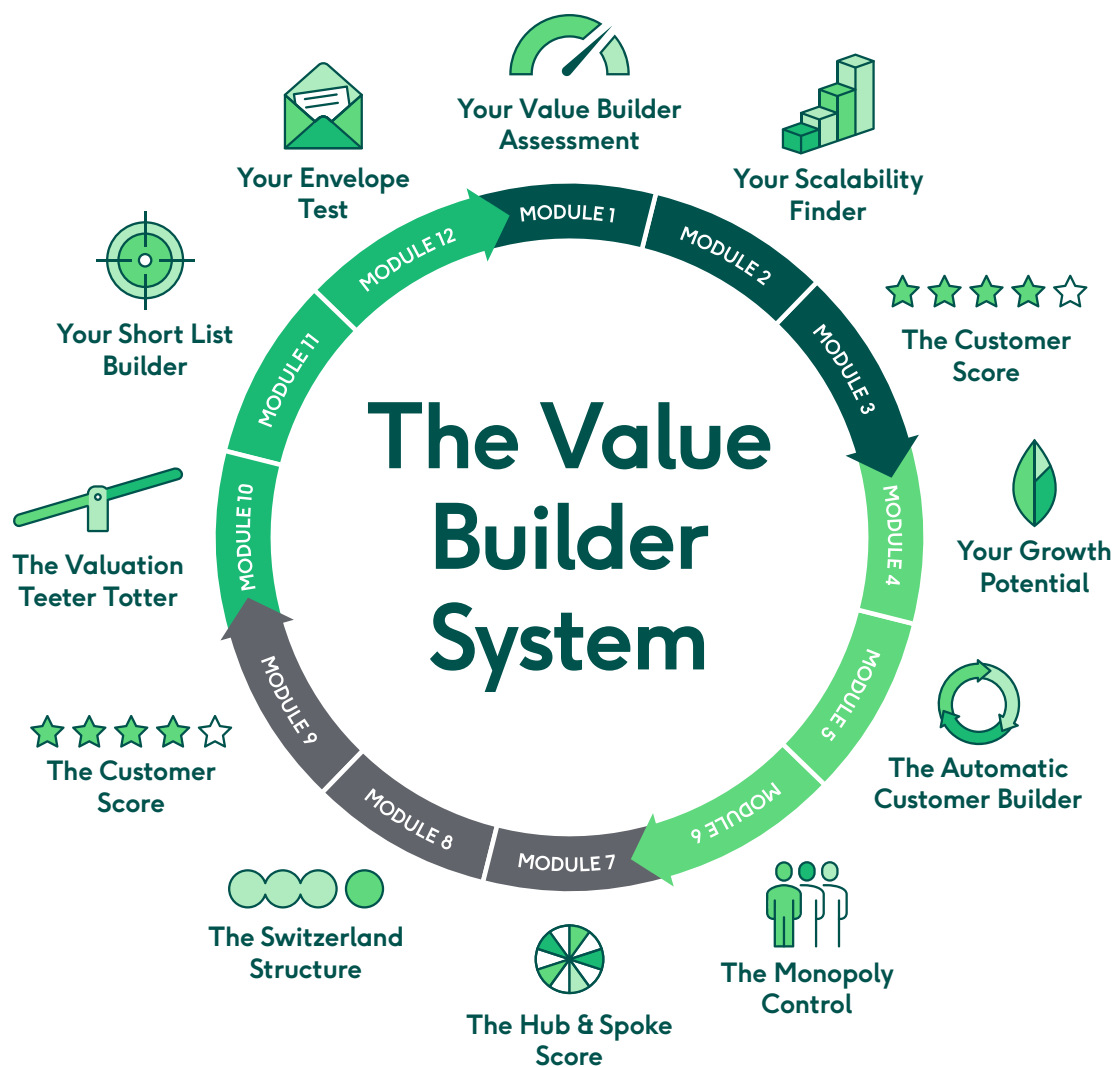


The Value Builder System

Drive the value of your business with proven online training through our 12-module Value Builder System!

Three reasons to get your Value Builder Score

- 1**
Make your company more valuable than your industry peers
- 2**
Discover your company's hidden assets
- 3**
Spot your company's silent killers



Your options at a glance

Our packages



Advanced Tax & Accounting

This is the best option for ambitious business owners who want comprehensive support and advice to help them build a truly successful business, maximize their income and wealth, and minimize their tax bills.



Full Tax & Accounting

This option is for those who don't want comprehensive support and help, but do nevertheless want more than just financial reports. It includes tax planning advice, and all your business and personal tax return preparation.



Essential Tax & Accounting

This option is for those on a tight budget who just need the most basic support, or for those whose tax and accounting needs are limited.

Whatever your business, one of our Elite Business Ecosystem packages is sure to suit your needs.

The tables on the following pages show what is included in each package.

	Advanced Tax & Accounting	Full Tax & Accounting	Essential Tax & Accounting
Simplify			
Tax Preparation: Annual business and personal returns	✓	✓	✓
All financial transactions entered. Bank and credit card accounts reconciled monthly	✓	✓	
We file your 1099s	Up to 20	Up to 10	\$35 per filing
Sales and use tax filings per entity	1 state included	\$79 per month*	\$99 per month*
Business personal property tax filings	1 county included	\$79 per month*	\$99 per month*
Bookkeeping complexity level	High	Medium	
Custom Financial Reporting	by the 13th	by the 19th	
Save			
Stay in control of your finances: quarterly estimated tax payment coupons	✓	✓	✓
Writeoffs and Deductions: tax advice and education to ensure you're getting all the deductions you're entitled to	3 x Year	2 x Year	1 x Year
IRS Advanced Notice: Peace of mind. We monitor your IRS account daily. First response included	IRS Advance Notice	\$79 / month	\$149 / month
Reasonable Compensation analysis: access to your money in the most tax efficient way	Unlimited	Unlimited	Not Included
Grow			
Value Builder Score: make your company more valueable than your industry peers	✓	✓	✓
Training & tools for growth: unlimited access to the Value Builder 12 module program!	✓	\$79 / month	\$149 / month
Online financial dashboard to benchmark your practice's performance against the industry	✓	✓	

*per entity

	Advanced Tax & Accounting	Full Tax & Accounting	Essential Tax & Accounting
Communication			
Proactive Communication: your client manager drives your engagement forward all year	✓	✓	✓
Guaranteed response time to your calls, texts, emails	1 business day	2 business days	3 business days
Video consult with your client manager or another team member as needed	Monthly	Quarterly	Semi-annually
Custom Projects			
CPA Meetings: Need to discuss an urgent matter?	1 bonus meeting per year	1 bonus meeting per year	
Do your books need some TLC? Enjoy a discount on the project	35% discount	25% discount	
Did you get an IRS letter that worries you? Let us help; and enjoy a discount on the project	35% discount	25% discount	
Need some prior year tax returns caught up? No problem	35% discount	25% discount	
Payroll troubleshooting or notice resolution weighing you down?	35% discount	25% discount	
The kitchen sink: you can't always foresee what help you'll need. Enjoy an ongoing discount on any future scope increase to your engagement	20% discount	10% discount	

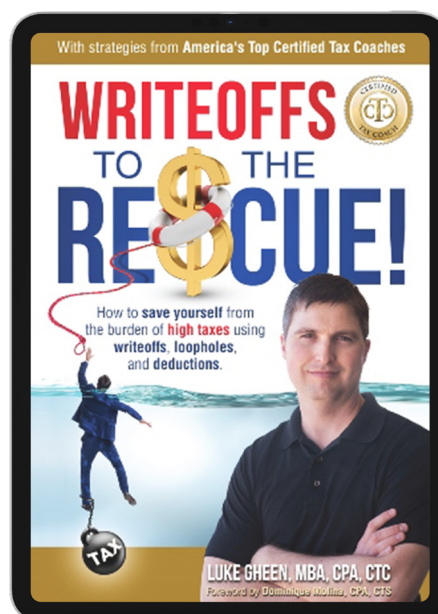
Request a Consultation

And get a free copy of
Writeoffs to the Rescue!
when you schedule your
consultation

Click the button below to complete a form on our website to request a free initial consultation. When you do you'll receive a free copy of the hard cover book *Writeoffs to the Rescue!* sold on Amazon. Our tax reduction planning services are highly effective for business owners making more than \$250,000.

[Request Your Consultation](#)

www.cpataxcoach.com/consultation.htm



What our happy clients say...



“

“Gheen & Co exceeds my expectations in every way...”

“You guys have freed me up to be able to expand my business and steer the ship, so that I’m working on my business not in my business. That has been huge for us. Your programs work: I can do my work, you can do your work, and we all work as a team. The monthly reports have been above and beyond – a nice surprise. Gheen & Co exceeds my expectations in every way: knowledge, expertise, kindness. Overall I feel like you treasure my business as much as I do.”

Danielle Pietrucioli,
Owner of a National Turf Company

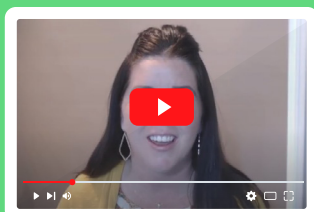
“

“I sleep better at night. I know my taxes and books are squared away...”

“By working with Gheen & Co through their Advanced Tax Planning, it’s helped me accomplish my personal and professional goals. Without them my tax liability would be double or triple what it is now. Because of the entire team at Gheen & Co, I sleep better at night. I know my taxes and books are squared away. The Advanced Tax Planning has paid off double or triple what it costs to engage. It has been a wonderful experience and worth every penny for sure.”

Scott Arceneaux,
Oral Surgeon

See more testimonials



www.cpataxcoach.com/video-testimonials.htm

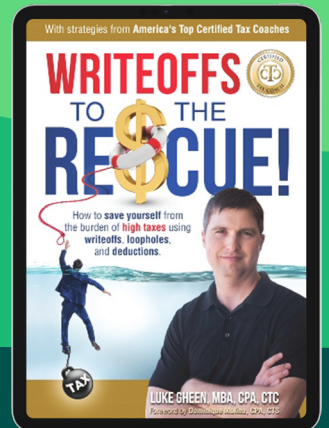
Certified Tax Coach.



Got a question? ~ cpa@gheencpa.com

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Get *Writeoffs to the Rescue!* when
you schedule your consultation

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